



Information and Referral Services In SSA District Offices A Pilot Study



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INFORMATION AND REFERRAL SERVICES
IN SSA DISTRICT OFFICES:
A PILOT STUDY

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Since its beginning the Social Security Administration has focused on providing service to the public. Along with its primary responsibility for assisting applicants in their benefit claims, the district office performs many collateral functions for beneficiaries and other members of the public. Some of these services are directly program related, such as referral for vocational rehabilitation, financial protection of incapable beneficiaries, and assistance in obtaining medical care payments through district office services. The district office also serves an important function as a community resource, by providing information and referral services to people with income maintenance and social service problems outside the scope of the social insurance program.

In recent years, recognition of the extensive need for social services of disadvantaged minorities and of the poor has led to a variety of approaches to information and referral problems. The poor usually need more help in finding and using existing services. Programs such as "social security alert" and "outreach," the relocation of district offices and the expansion of branch and satellite offices are indicative of the Administration's interest and efforts to provide for the needs of all segments of the population within the limits of SSA jurisdiction and capacities. Knowledge of and referral to community resources are considered essential aspects of the Administration's service to the public:

The people who come to our offices often bring with them problems and questions which are outside our program and competence. While maintaining a clear focus on our own responsibilities, we should know about community resources, participate in their development, and operate a helpful referral service.^{1/}

Reviews of SSA's information and referral practices were conducted in 1955 and 1957.^{2/} The study reports made several recommendations for strengthening the community service role of the district offices. Some of these recommendations were incorporated in the Claims Manual, to expand the referral function of the district office.

1/ Social Security Administration, The Objectives of the Social Security Administration, 1965.

2/ "Report of a Study of Non-OASI Requests Received at District Offices," Elizabeth de Schweinitz, Social Security Administration, September 1955 (typescript). "Report of a Study of Referral Services by Old-Age and Survivors Insurance District Offices," Roberta E. Townsend, Social Security Administration, January 1957 (processed).

Since that time, the growth in the scope and complexity of the SSA program has increased the workload pressure on the district offices. These commitments of staff resources also affect the ability of the district offices to provide referral services in related program areas.

To provide a basis for policy decisions as to the role which SSA district offices can and should be expected to play in the provision of information and referral services, current information on the existing demand for such services and the way such demands are being met was needed.

Study Method

A study plan was developed by the Office of Research and Statistics in collaboration with the SSA Community Planning Staff to examine the existing demand for referral and related services in the district offices (DO's), the way in which the DO's are now meeting these requests for services, and the factors which affect the demand for services.

As a first step, a pilot study was conducted to determine the frequency and type of problems recognized by the claims staff. In cooperation with the Bureau of District Office Operations (BDOO), an interview schedule was developed relating to the characteristics, problems, and referral of all persons in contact with the DO claims staff. Data were collected by the claims staff in the sample DO's during the survey week, May 17-23, 1970.

A stratified probability sample, representative of the approximately 800 SSA district and branch offices, was selected from the DO work sampling project panels. The panel consisted of 64 district and branch offices (DO's), stratified by number of offices, DO workload and staff size within each BDOO region. All claims staff on duty in the sample DO's during the survey week participated in the study--a total of 806 claims and supervisory staff members.

Each service representative, claims representative, field representative, branch manager, and operations supervisor was randomly assigned a 2-hour reporting period during regular office hours. A questionnaire was completed for each interview, telephone call or mail inquiry answered during his reporting period. The assistant manager was assigned a reporting period when no operations supervisor was available. Where an assistant manager was not available, the manager was assigned. The data in this report are based on the 2,890 DO contacts recorded during regular office hours, in the week of May 17-23, 1970.

In offices with extended office hours, each staff member working overtime was assigned an additional 1-hour reporting period. Only 18 offices were open to the public beyond regular hours during the survey week, usually for a period of 3 hours. A total of 208 contacts were reported by 89 members of the claims staff during these extended office

hours. Relatively few contacts (3 percent) involved non-social security problems. No further data on contacts in extended office hours are presented in this report because of the small number of information and referral contacts.

Two weeks prior to the survey week, the participating district offices were sent questionnaires, instructional material, and staff assignment sheets. Individual time periods for questionnaire completion were assigned by central office staff. Instructions for revising time periods because of personnel absences or changes were provided. In each office, a staff member was assigned as survey coordinator with responsibility for training the claims staff and supervising the survey in his office.

During the survey week BDOO and ORS central office staff visited several DO's to observe the conduct of the study. These visits also provided an opportunity to discuss with DO employees their experiences with the information and referral process.

Study Findings

The study found that 7 percent of the DO contacts involved inquiries on information and referral problems which were not directly related to social security services (table 1).^{3/} These problems were raised more frequently during personal visits to the DO than in telephone calls and were relatively rare in mail inquiries. About half of all claims staff contacts were by telephone and about two-fifths were the result of personal visits to the district office.

Field representatives and supervisory staff handled a higher proportion of non-social security problems in their workload than did service and claim representatives. However, this was a relatively small proportion of all information and referral cases. About half of the non-social security contacts were handled by service representatives and about one-third by claim representatives--roughly the same proportion as that of all DO contacts.

Virtually all DO contacts involved some social security questions, such as claims applications, post-entitlement activity and Medicare. However, about one-fourth of the people with information and referral problems did not request any social security services. Medicare questions were somewhat more frequently associated with information and referral problems than were other social security services (table 1). Contacts for post-entitlement services raised information and referral questions less frequently than other DO callers.

^{3/} The standard error of this estimate is approximately ± 0.5 percent. The chances are 95 out of 100 that the true estimate is between 6 and 8 percent.

Projecting from the survey data for the sample DO's to the total number of contacts in SSA district and branch offices, it is estimated that there were approximately 700,000 contacts with the public in the survey week, during regular office hours. About 50,000 of these contacts would have involved information and referral for problems outside the scope of social security services, more than half of which were raised during personal interviews with the claims staff. Assuming a relatively constant rate of inquiries, this would indicate a total volume of approximately 35 million contacts with the public by the claims staff during the year, of which about 2½ million would involve non-social security problems.

Of all persons contacting the DO, about one-third were applicants and one-third were beneficiaries. More than half were women and one-third were aged 65 and over; about two-thirds were white (table 2). The characteristics of callers whose DO contact involved information and referral problems were generally similar, with the possible exception of race. A significantly higher proportion of information and referral problems than of all contacts came from Negroes. However, in about a quarter of the cases race was not recorded--primarily in the telephone and mail inquiries. The proportion of white persons among those with non-social security problems was about the same as among all contacts.

Information and referral contacts were also similar to all DO contacts in the distribution by metropolitan area, racial composition of the DO service area, and office workload (table 3).

There was little difference between total DO contacts and contacts with persons with non-social security problems in the time of contact. Contacts were about evenly distributed between late morning and early afternoon and among days of the week, with some slight tendency for an increased volume of contacts on Monday and Tuesday (table 4).

Type of Problem

Income problems were the most frequently discussed information and referral problem. About one-fourth of the non-social security contacts involved inadequate income or public welfare needs. Other income problems--usually involving eligibility for benefits under Veterans Administration, unemployment compensation, and other income-maintenance programs--were raised in about one-fourth of the cases (table 5). Medical care costs and services was another frequent concern of callers and visitors. About one-sixth were seeking assistance in meeting costs of medical care, and about the same proportion needed help or information in obtaining medical or nursing care or in arranging for nursing home placement. About one-sixth wanted advice or information on private health insurance coverage or programs. Employment, housing or social services and taxes were less frequently mentioned as problems.

Types of Contact

Applicants and beneficiaries were somewhat more likely than other contacts to present problems related to inadequate income (table 5). Beneficiaries and persons acting on behalf of an applicant or beneficiary were more frequently concerned with medical care and other health related problems. This was particularly notable in information and referral problems relating to nursing home placement and medical care services. About one-third of those acting on behalf of another person were concerned with this problem.

The demographic characteristics of the people who contacted the DO were also related to the nature of the problem raised. Negroes, for example, were far more likely than white persons to raise problems about inadequate income, but there was relatively little variation in the frequency of this problem by sex and age. On the other hand, younger persons were more likely than those aged 65 and over to inquire about other income sources and benefit programs. Health and medical care problems were more frequently raised by the aged. Employment questions were largely concentrated among persons under age 65 (table 6).

Referral to Other Agencies

In 94 percent of the non-social security contacts, a referral was made to another agency (table 7). In 1 out of 10 cases the DO interviewer also provided the name of a specific person to contact, phoned the agency for information or made an appointment. The staff member's assistance was usually limited to providing the agency name and address. Rarely was an appointment made for the caller.

The public welfare agency was the most frequent referral--about one-third of the contacts with non-social security problems. The next most important in terms of referral were the Veterans Administration and private health insurance agencies; about 1 in 8 persons were referred to these agencies. About 1 in 8 men were also referred to the unemployment compensation offices. Women were more likely than men to be referred to public welfare agencies and to health care and health insurance organizations; other than this, the agency referral pattern was relatively similar for men and women (table 8).

Of those referred to a service agency, about two-thirds said that they intended to go to the agency; a few said that they did not plan to follow-up the referral (table 9). The response to the referral was not ascertained for about one-fifth of the cases. The nature of the problem apparently had little effect on whether or not the caller planned to follow through on the referral.

District Office Visits

The study also provided some information on the nature of contacts with the DO claims staff and on the characteristics of callers (table 10).

In terms of the type of contact, the service representative and supervisory staff had more telephone than personal contacts with visitors and callers. Claims and field representatives, however, handled more of their workload through personal calls than telephone or mail contacts.

Applicants for social security benefits were more likely than other callers to have personal contact with the DO. Beneficiaries were about equally split between telephone and personal contacts. All other persons were more likely to telephone than to visit the DO.

Persons aged 50-64 were somewhat more likely than younger or older people to contact the DO in person. Men were more likely than women to visit the DO personally. There was no difference between white persons and Negroes in the type of DO contact.

District Office Observation

BDOO and ORS central office staff observed staff interviews in a total of 18 offices during March and May 1970. Observers visited six offices during the pretest of the questionnaire and the survey procedures in March 1970 and 12 DO's during the pilot study. The observers discussed with administrative and claims staff their experiences with the information and referral process and the kinds of problems presented.

DO claims staff appeared to be very interested in assisting the public with problems outside the scope of the social security program. Inadequate income was reported as the most frequently recurring problem. This problem was usually referred to the local public assistance agency. Applicants for disability benefits were particularly noted as being very often in need of financial aid, particularly during the waiting period for benefit eligibility.

Referrals to agencies such as the Veterans Administration and Railroad Retirement Board often flow directly from the claims interview. Wage earners with military service or railroad employment are encouraged to file for benefits with the appropriate agency. DO employees reported relatively infrequent referrals to the voluntary agencies that provide counseling with individual and family problems.

Information about community agencies and facilities was usually available from health and welfare council directories and DO-compiled listings of agencies and facilities in the service area. In some areas, pamphlets describing community resources in a concise form were also available.

DO employees seemed to be well informed about the agencies administering income-maintenance and medical programs. However, supervisory employees appeared to have a better understanding of other community resources than did the claims staff.

There was general agreement among the ORS observers that the DO interviewers were attentive to clearly presented problems. Although they did not attempt to probe for or to pursue non-social security problems, the DO staff seemed knowledgeable and cooperative in referring people to appropriate public agencies.

Summary and Conclusions

The purpose of the pilot study was to provide the basis for recommendations on the size and scope of a proposed study of the information and referral services provided by SSA district offices. The pilot study was undertaken to obtain an estimate of the frequency and type of non-social security problems arising in the course of normal DO business.

The study found that 7 percent of the DO contacts involved information and referral problems. This is similar to the level of requests reported in the 1957 study.^{4/} Although a relatively small proportion of DO business, they constituted a substantial volume of information and referral inquiries, about 2½ million requests a year.

The study also found relatively little difference between the characteristics of all DO contacts and of the contacts in which non-social security problems were presented. Aside from a somewhat greater tendency among those presenting non-social security problems to visit the DO for personal interview, there was, in general, little difference in the rate of non-social security problems presented by job title of DO personnel contacted, by program status or demographic characteristics of the caller; the location or size of office, hour of the day, and day of the week in which the contact was made were also similar. Aside from a low rate of information and referral problems presented by those with post-entitlement or general social security interests, there was little variation by type of social security services sought. However, a sizable proportion of those presenting information and referral problems did not request any social security services.

The bulk of the problems presented related to inadequate income, income from other program sources, medical care sources, and health insurance problems. The nature of the problems did vary by applicant and beneficiary status, and by age, sex and race. Variations in the problems presented are generally related to differences in the age of applicants and of beneficiaries, and to the process of claims development,

^{4/} Townsend, op. cit.

in contrast to post-adjudicative needs and interests. Almost all contacts involving non-social security problems resulted in a referral to an appropriate agency, largely public welfare and other income-maintenance agencies, or to a variety of health care and health insurance organizations. There was relatively little variation in referral practices by program status of the caller. Most persons referred to an agency indicated an intention to follow through on the referral, with little variation by the nature of the problem.

On the basis of these findings, extension of the study to a larger sample of DO's is not recommended. The study findings do not indicate that the variability in the rate or type of inquiry by DO staff composition or location is of sufficient interest to warrant the large scale study required for an extensive analysis of the referral process.

The data presented in this report are based entirely on the problems recognized and recorded by the DO interviewer. It should be pointed out that the study does not indicate the extent to which information and referral problems are not perceived by claims staff members or are inadequately presented by the caller. These questions are, however, beyond the scope of this study and can only be examined by further study. Systematic observation of the contact process and interviews with the caller would be required to determine if the client's questions or problem had been adequately dealt with and to probe for problems which had not been articulated in the course of the interview.

March 1971

TABLE 1.--District office contacts and persons with information and referral problems by type of contact, job title of claims staff, and type of service needed

Type of contact, job title, and type of service needed	Total persons contacted	Contacts with information and referral problems	
		Percentage distribution	Percent of all persons
Number.....	2,890	200	---
<u>Type of contact</u>			
Total percent.....	100.0	100.0	6.9
Telephone.....	48.5	40.5	5.8
In person.....	42.8	53.0	8.6
Mail.....	5.6	1.5	1.9
Type of contact not recorded.....	3.1	5.0	11.2
<u>Job title</u>			
Total percent.....	100.0	100.0	6.9
Service representative.....	52.7	49.5	6.5
Claims representative.....	36.9	34.5	6.5
Field representative.....	7.9	12.0	10.5
Supervisory staff.....	2.5	4.0	11.3
<u>Type of service needed</u>			
Total percent.....	100.0	100.0	6.9
No social security service needed.	2.8	24.0	<u>1/</u> 65.0
Social security service <u>2/</u>	97.3	76.0	5.4
Claim.....	32.6	31.5	6.7
Post-entitlement activity.....	31.0	13.0	2.9
Medicare.....	21.7	28.0	8.9
Social security information.....	6.5	3.5	3.7
F.I.C.A. tax.....	1.5	1.5	7.0
Other aspects of social security	10.7	7.5	4.9

1/ Includes some miscellaneous inquiries, such as inquiries about employment with SSA, not related to information and referral problems.

2/ Some persons required more than one type of social security service, therefore the total of individual services exceeds 100 percent.

TABLE 2.--District office contacts and persons with information and referral problems by selected characteristics of caller

Selected characteristics	Total persons contacted	Persons with information and referral problems
Number.....	2,890	200
<u>Program status of caller</u>		
Total percent.....	100.0	100.0
Applicant.....	31.1	34.5
Beneficiary.....	33.7	30.5
Person acting for applicant or beneficiary.....	16.4	14.5
Representative payee.....	2.4	---
Other.....	14.7	14.0
Program status not known.....	1.8	6.5
<u>Sex</u>		
Total percent.....	100.0	100.0
Men.....	43.1	40.0
Women.....	55.5	60.0
Sex not recorded.....	1.4	---
<u>Age</u>		
Total percent.....	100.0	100.0
Under age 50.....	25.6	27.0
50-64.....	31.6	33.5
65 and over.....	33.7	32.0
Age not recorded.....	9.1	7.5
<u>Race</u>		
Total percent.....	100.0	100.0
White.....	62.9	61.5
Negro.....	9.0	16.0
Other.....	.6	---
Race not recorded.....	27.5	22.5

TABLE 3.--District office contacts and persons with information and referral problems by location in metropolitan area, workload, and racial composition of district office service area

District office characteristics	Total persons contacted	Persons with information and referral problems
Number.....	2,890	200
<u>Percentage distribution</u>		
Location.....	100.0	100.0
Standard metropolitan statistical area.....	85.7	84.5
Under 500,000.....	27.0	25.5
500,000-999,999.....	19.4	19.5
1 million or over.....	39.2	39.5
Outside standard metropolitan statistical area.....	14.3	15.5
Annual workload 1/.....	100.0	100.0
Less than 20,000 work units.....	17.7	19.5
20,000-49,999 work units.....	42.8	38.5
Over 50,000 work units.....	39.5	42.0
Racial composition of DO service area 2/.....	100.0	100.0
85 percent or more white.....	81.3	87.5
15 percent or more Negro and other races.....	18.7	12.5

1/ Fiscal year 1969.

2/ Based on distribution of beneficiaries in DO service area.

TABLE 4.--District office contacts and persons with information and referral problems by hour and by day of week

Hour of contact and day of week	Total persons contacted	Persons with information and referral problems
Number.....	2,890	200
<u>Hour of contact</u>		
Total percent.....	100.0	100.0
8:00-9:00 a.m.....	3.5	5.5
9:00-10:00 a.m.....	13.5	9.0
10:00-11:00 a.m.....	15.5	18.0
11:00 a.m.-12:00 p.m.....	12.5	11.0
12:00 p.m.-1:00 p.m.....	9.9	11.0
1:00-2:00 p.m.....	13.6	13.5
2:00-3:00 p.m.....	13.7	14.0
3:00-4:00 p.m.....	12.0	12.0
4:00-5:00 p.m.....	5.7	6.0
<u>Day of week</u>		
Total percent.....	100.0	100.0
Monday.....	22.6	22.5
Tuesday.....	20.2	22.5
Wednesday.....	18.7	20.0
Thursday.....	19.6	17.5
Friday.....	18.9	17.5

TABLE 5.--Program status of caller by type of problem

Type of problem	Total	Appli-cant	Benefi-ciary	Person acting for applicant or beneficiary	Other
Number.....	<u>1/200</u>	69	61	29	28
Total percent <u>2/</u>	100.0	100.0	100.0	100.0	100.0
Inadequate income; public welfare.....	26.0	30.4	32.8	24.1	10.7
Other income problems.....	26.5	34.8	19.7	17.2	35.7
Medical care costs <u>3/</u>	17.5	13.0	26.2	20.7	7.1
Obtaining medical care or nursing home placement.....	14.5	8.7	18.0	37.9	3.6
Private health insurance.....	15.0	13.0	21.3	20.7	7.1
Housing or social services...	8.5	5.8	13.1	13.8	3.6
Employment.....	10.0	8.7	4.9	3.4	21.4
Taxes.....	7.5	7.2	3.3	3.4	17.9
Other problems.....	7.0	4.3	8.2	3.4	7.1

1/ Includes 13 cases with program status not recorded.

2/ Some persons presented more than one problem, therefore the sum of individual problems exceeds 100 percent.

3/ Other than Medicare problems.

TABLE 6.--Sex, age, and race of caller by type of problem

Type of problem	Total	Sex		Age			Race	
		Men	Women	Under age 50		Age 50-64	Age 65 and over	White
				54	67			
Number.....	1/200	80	120					
Total percent 2/...	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Inadequate income; public welfare.....	26.0	22.5	28.3	24.1	31.3	26.6	22.8	56.2
Other income problems...	26.5	28.8	25.0	33.3	32.8	15.6	31.7	18.8
Medical care costs.....	17.5	12.5	20.8	9.3	14.9	28.1	16.3	15.6
Obtaining medical care or nursing home placement.....	14.5	18.8	11.7	5.6	13.4	23.4	17.9	6.2
Private health insurance	15.0	10.0	18.3	7.4	10.4	26.6	15.4	9.4
Housing or social services.....	8.5	7.5	9.2	7.4	7.5	10.9	9.8	6.2
Employment.....	10.0	16.2	5.8	11.1	13.4	3.1	9.8	6.7
Taxes.....	7.5	8.8	6.7	16.7	1.5	4.7	6.5	3.1
Other problems.....	7.0	8.8	5.8	7.4	6.0	4.7	6.5	3.1

1/ Includes 15 cases with age not recorded.

2/ Some persons presented more than one problem, therefore the total of individual problems exceeds 100 percent.

TABLE 7.--Program status of caller by referral action

Referral assistance	Total	Applicant	Beneficiary	Person acting for applicant or beneficiary	Other
Number.....	<u>1</u> /200	69	61	29	28
Total percent.....	100.0	100.0	100.0	100.0	100.0
No referral.....	6.0	4.3	6.6	13.8	---
Referral <u>2</u> /.....	94.0	95.7	93.4	86.2	100.0
Gave name and address of agency.....	85.5	87.0	85.2	82.8	82.1
Gave name of person...	6.0	7.2	4.9	3.4	10.7
Phoned agency.....	3.5	4.3	3.3	---	7.1
Made appointment.....	1.0	1.4	1.6	---	---

1/ Includes 13 cases with program status not recorded.

2/ More than one type of referral assistance was given in some cases.

TABLE 8.--Agency of referral by sex of caller

Type of agency	Total	Men	Women
Number.....	200	80	120
Total percent <u>1/</u>	100.0	100.0	100.0
Public welfare.....	35.0	27.5	40.0
Unemployment compensation.....	7.0	13.8	2.5
Veterans Administration.....	13.5	16.3	11.7
Workmen's compensation.....	.5	1.3	.0
Railroad retirement.....	3.0	.0	5.0
Civil service.....	2.0	1.3	2.5
Other income-maintenance programs	3.5	3.8	3.3
Public health department.....	3.5	2.5	4.2
Outpatient clinic.....	.5	1.3	.0
Other medical care.....	8.5	6.3	10.0
Private health insurance.....	12.0	7.5	15.0
Community referral service.....	2.5	5.0	.8
Senior citizens center.....	.5	1.3	.0
Other social service.....	5.0	5.0	5.0
Public housing.....	2.5	5.0	.8
Other housing.....	1.0	.0	1.7
State employment service.....	6.0	8.8	4.2
Other employment.....	4.0	6.3	2.5
Internal Revenue Service.....	4.5	3.8	5.0
Other tax.....	1.0	2.5	.0
Other agency.....	5.5	5.0	5.8
No referral.....	6.0	8.8	4.2

1/ Total exceeds 100 percent as some persons were referred to more than one agency.

TABLE 9.--Type of problem by caller's response to referral

Response to referral	Total	Inadequate income; public welfare	Other income problems	Medical care costs 1/	Medical care and nursing home placement	Private health insurance	Employment	All other 2/
Number.....	200	52	53	35	29	30	20	46
Total percent....	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
No referral.....	6.0	---	3.8	2.9	10.3	16.7	---	6.5
Referral.....	94.0	100.0	96.2	97.1	89.7	83.3	100.0	93.5
Intended to go to agency.....	67.0	71.2	75.5	60.0	65.5	60.0	85.0	67.4
Did not plan to go to agency.....	5.5	13.5	1.9	11.4	3.4	---	5.0	2.2
Intention not known	21.5	15.4	18.9	25.7	20.7	23.3	10.0	23.9

1/ Other than Medicare.

2/ Includes housing and social services, taxes, and other problems.

TABLE 10.--Job title of claims staff and program status, age, race, and sex of caller by type of contact

Classification	Total number	Percentage distribution				
		Total	Tele- phone	In person	Mail	Type of contact not re- corded
Number.....	2,890	100.0	48.5	42.8	5.6	3.1
<u>Job title</u>						
Service representative.....	1,525	100.0	62.4	25.8	8.4	3.4
Claims representative.....	1,066	100.0	33.9	59.9	3.1	3.1
Field representative.....	288	100.0	20.6	77.2	(*)	1.8
Supervisory staff.....	71	100.0	60.6	39.4	(*)	(*)
<u>Program status</u>						
Applicant.....	898	100.0	32.0	61.6	2.9	3.6
Beneficiary.....	975	100.0	46.8	42.6	8.3	2.4
Persons acting for applicant or beneficiary.....	473	100.0	69.3	24.1	3.2	3.4
Representative payee.....	68	100.0	48.5	44.1	7.4	---
Other.....	424	100.0	59.4	28.3	8.3	4.0
Program status not recorded..	52	100.0	88.5	9.6	---	1.9
<u>Age</u>						
Under age 50.....	740	100.0	55.9	36.4	4.1	3.6
50-64.....	912	100.0	37.1	56.7	3.5	2.7
65 and over.....	974	100.0	45.0	44.3	8.0	2.8
Age not recorded.....	264	100.0	80.3	7.6	8.3	3.8
<u>Race</u>						
White.....	1,818	100.0	36.8	57.7	2.9	2.6
Negro.....	260	100.0	32.7	61.2	1.5	4.6
Other.....	18	(**)	---	---	---	---
Race not recorded.....	794	100.0	80.9	2.3	13.2	3.7
<u>Sex</u>						
Men.....	1,246	100.0	38.8	51.2	7.0	3.0
Women.....	1,603	100.0	55.6	37.0	4.2	3.1
Sex not recorded.....	41	100.0	63.4	14.6	17.1	4.9

* Less than 0.5 percent.

** Distribution not shown where base is less than 20 cases.

**SURVEY OF DISTRICT OFFICE INFORMATION AND REFERRAL SERVICES
CLAIMS STAFF QUESTIONNAIRE**

Complete this schedule for each individual who is interviewed, telephones or whose correspondence is handled during this survey period.

1. DISTRICT OFFICE CODE	DATE	TIME STARTED
COMPLETED BY (Name)		JOB TITLE
2. CONTACT WITH DISTRICT OR BRANCH OFFICE:		<input type="checkbox"/> TELEPHONE <input type="checkbox"/> IN PERSON <input type="checkbox"/> MAIL
3. SOCIAL SECURITY PROGRAM STATUS OF INQUIRER		
1. <input type="checkbox"/> APPLICANT 2. <input type="checkbox"/> BENEFICIARY 3. <input type="checkbox"/> PERSON ACTING FOR APPLICANT OR BENEFICIARY 4. <input type="checkbox"/> REPRESENTATIVE PAYEE 5. <input type="checkbox"/> OTHER (Specify) _____ _____ _____ _____		
6. <input type="checkbox"/> DON'T KNOW		
4. PLEASE CHECK AGE, SEX AND RACE, IF KNOWN:		
AGE <input type="checkbox"/> UNDER 50 <input type="checkbox"/> 50-64 <input type="checkbox"/> 65 AND OVER		
SEX <input type="checkbox"/> MALE <input type="checkbox"/> FEMALE		
RACE <input type="checkbox"/> WHITE <input type="checkbox"/> OTHER <input type="checkbox"/> NEGRO <input type="checkbox"/> DON'T KNOW		
5. (a) WAS THE INTERVIEW, PHONE CONTACT OR CORRESPONDENCE CONCERNED WITH A SOCIAL SECURITY CLAIM, BENEFIT OR OTHER ASPECT OF THE PROGRAM?		
<input type="checkbox"/> YES <input type="checkbox"/> NO (Go to Q. 6)		
(b) WAS IT RELATED TO - (Check all that apply)		
(1) <input type="checkbox"/> CLAIM (2) <input type="checkbox"/> POST ENTITLEMENT ACTIVITY (3) <input type="checkbox"/> MEDICARE-HOSPITAL INSURANCE OR SMI (4) <input type="checkbox"/> SOCIAL SECURITY INFORMATION (5) <input type="checkbox"/> F.I.C.A. TAX (6) <input type="checkbox"/> OTHER ASPECTS OF SOCIAL SECURITY PROGRAM (Specify) _____ _____ _____		
6. (a) DID ANY OTHER PROBLEM OR REQUEST FOR INFORMATION COME UP DURING THE INTERVIEW OR CALL?		
<input type="checkbox"/> YES (Go to Q. 7) <input type="checkbox"/> NO		
(b) DID YOU GIVE THIS PERSON ANY OTHER HELP OR SUGGESTIONS?		
<input type="checkbox"/> YES (Describe) <input type="checkbox"/> NO _____ _____ _____		
(c) TIME COMPLETED		

7. (a) WAS THIS ABOUT INCOME OR BENEFITS?

NO YES (Check all that apply)

(1) BENEFITS UNDER OTHER PROGRAMS

(2) INADEQUATE INCOME

(3) OTHER INCOME PROBLEM (Specify) _____

(b) WAS THIS ABOUT MEDICAL CARE OR PRIVATE HEALTH INSURANCE (Other than Social Security Medicare)

NO YES (Check all that apply)

(1) ASSISTANCE WITH COSTS OF MEDICAL CARE

(2) WHERE TO GET MEDICAL OR NURSING CARE

(3) NURSING, CONVALESCENT OR BOARDING HOME PLACEMENT

(4) PRIVATE HEALTH INSURANCE

(5) OTHER MEDICAL CARE PROBLEM (Specify) _____

(c) WAS THIS ABOUT HOUSING?

NO YES (Check all that apply)

(1) LESS EXPENSIVE HOUSING

(2) MORE ADEQUATE HOUSING

(3) OTHER HOUSING PROBLEM (Specify) _____

(d) WAS THIS ABOUT SOCIAL SERVICES?

NO YES (Check all that apply)

(1) HOMEMAKING AND HOUSEKEEPING

(2) FAMILY OR CHILD COUNSELING

(3) ACTIVITIES FOR SENIOR CITIZENS

(4) OTHER SOCIAL SERVICE PROBLEM (Specify) _____

(e) WAS THIS ABOUT EMPLOYMENT?

NO YES

(Specify) _____

(f) WAS THIS ABOUT FEDERAL OR STATE TAXES?

NO YES

(Specify) _____

(g) WAS THIS ABOUT INFORMATION OR HELP WITH ANY OTHER PROBLEM?

NO YES

(Specify) _____

6. HOW DID THE PROBLEM(S) COME UP?

INQUIRER ASKED SPECIFICALLY

BECAME EVIDENT DURING INTERVIEW/CALL

OTHER (Specify) _____

9. DID YOU REFER THE INQUIRER TO ANOTHER AGENCY OR FACILITY?

YES NO (Go to Q. 14)

10. WHAT DID YOU DO? (Check all that apply)

GAVE NAME AND ADDRESS OF AGENCY OR FACILITY

GAVE NAME OF PERSON TO CONTACT AT AGENCY OR FACILITY

PHONED AGENCY OR FACILITY FOR INFORMATION AND GIVE INFORMATION TO INQUIRER

MADE AN APPOINTMENT FOR INQUIRER

11. WHAT WAS HIS/HER RESPONSE TO YOUR SUGGESTION OR REFERRAL?

INQUIRER INDICATED HE WOULD GO TO AGENCY OR FACILITY

INQUIRER INDICATED HE WOULD NOT GO TO AGENCY OR FACILITY

NOT KNOWN

OTHER (Specify) _____

12. WHAT AGENCIES OR FACILITIES DID YOU REFER HIM TO?

NAME

NAME

13. CHECK TYPES OF AGENCIES**INCOME MAINTENANCE AND BENEFIT PAYMENTS**

(1) PUBLIC WELFARE
(2) UNEMPLOYMENT COMPENSATION
(3) VETERAN'S ADMINISTRATION
(4) WORKMEN'S COMPENSATION
(5) OTHER (Specify) _____

MEDICAL CARE AND PRIVATE HEALTH INSURANCE

(1) PUBLIC HEALTH DEPARTMENT
(2) OUTPATIENT CLINIC
(3) PRIVATE HEALTH INSURANCE CARRIER
(4) HEALTH REFERRAL SERVICE
(5) OTHER (Specify) _____

HOUSING

(1) PUBLIC HOUSING AUTHORITY
(2) OTHER (Specify) _____

SOCIAL SERVICES

(1) PUBLIC HEALTH DEPARTMENT
(2) CENTRAL REFERRAL SERVICE
(3) SENIOR CITIZENS CENTER
(4) OTHER (Specify) _____

EMPLOYMENT

(1) STATE EMPLOYMENT SERVICE
(2) OTHER (Specify) _____

TAXES

(1) INTERNAL REVENUE SERVICE
(2) STATE TAX DEPARTMENT
(3) OTHER (Specify) _____

OTHER AGENCIES

(1) OTHER (Specify) _____

14. DID YOU GIVE THIS PERSON ANY OTHER HELP OR SUGGESTIONS?

NO YES—WHAT? (Describe) _____

TIME COMPLETED

COMMENTS:

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